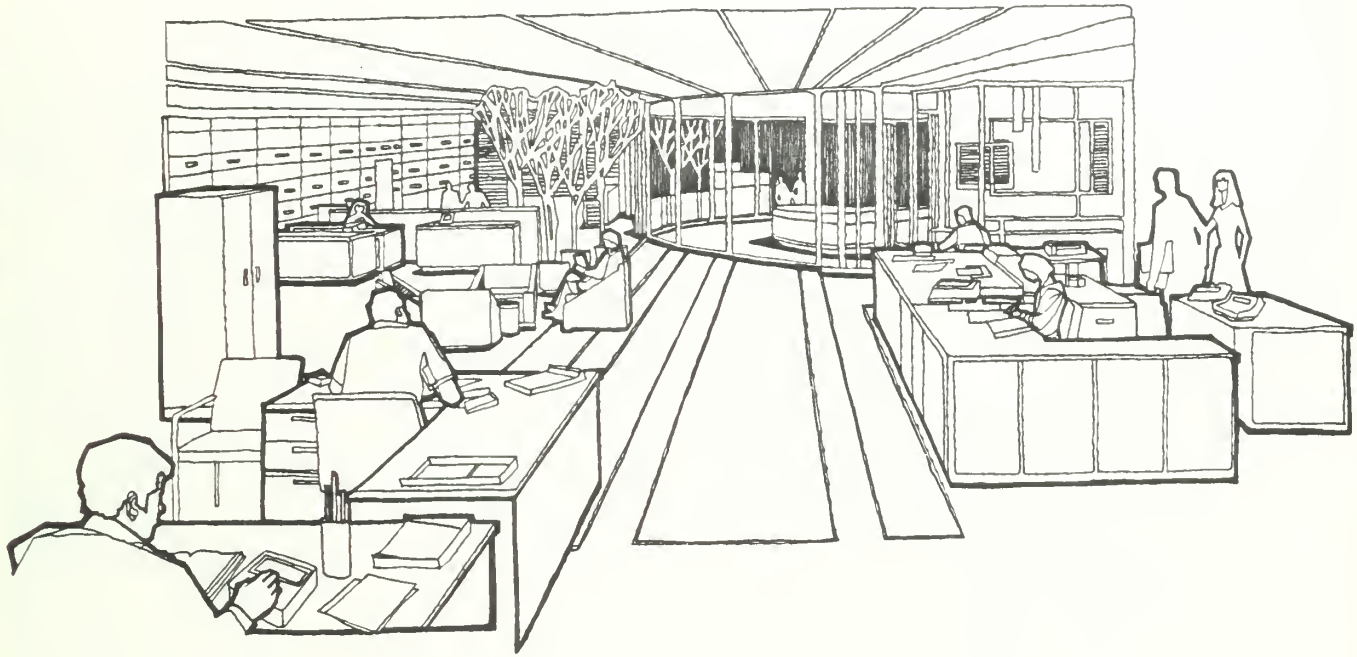


OFFICE PROCEDURES

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NOTE: This publication is a service document. The advice and direction offered is not prescriptive except where it duplicates or paraphrases the content of the Program of Studies. In these instances, the content is in the same distinctive manner as is this notice so that the reader may readily identify all prescriptive statements or segments of the document.

Mandatory implementation of the program is September, 1985.

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PHILOSOPHY OF BUSINESS EDUCATION PROGRAM

Business Education is an interdisciplinary study of the principles, procedures and technologies within the business environment and thus plays a significant role in meeting the Goals of Schooling and Goals of Education in Alberta Schools. Within this program a student has the opportunity to learn more about the role of a future participant within a productive society and to build a framework for a successful career. The knowledge, skills, attitudes and habits expected in business assist students, upon completion of high school, to respond to the opportunities and expectations of the world of work.

The development of the individual's potential in the areas of psychomotor, affective and cognitive domains is central to learning and instruction. Individuals discover themselves and realize their potential by interacting with ideas, technology and people. The world of business is an appropriate focus for this interaction.

Presented from the dual viewpoint of the individual as a consumer within the marketplace and a participant within the production cycle, the content within the Business Education Program provides for development of:

1. Skills and knowledge all citizens need to successfully participate in the business world,
2. Skills for immediate job entry, and
3. Skills and knowledge supportive of a business-related post-secondary program.

The continuum of experiences within the business education program starts with exploratory activities in junior high school and expands in scope and depth at the high school level. The program can meet the three general objectives while providing viable alternatives and challenge for students of all levels of ability and interests. The relevance of the program is further enhanced through the integration of technology and related practices throughout the program, helping prepare the student for the information age.

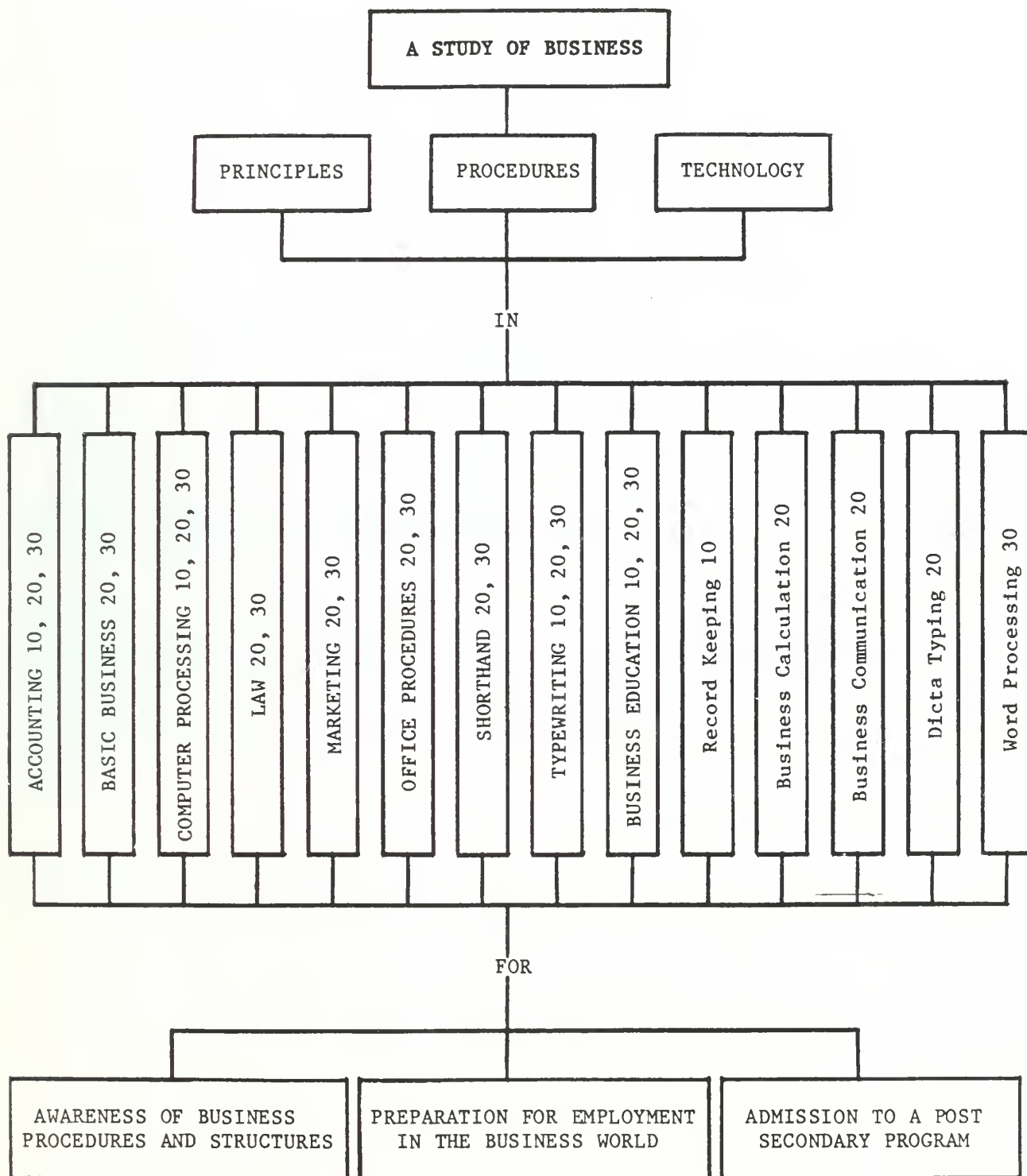
SPECIFIC OBJECTIVES OF THE ALBERTA BUSINESS EDUCATION PROGRAM

Senior High School

The business education curriculum provides education ABOUT business for ALL students in order that they become informed citizens, and education FOR business for SOME students in order that they become effective workers. More specifically, the purpose of the program is:

1. To provide a meaningful study of the business environment including the ideas, people, and technology of business.
2. To provide for the development and acquisition of business knowledge and skills which will be most useful and durable in a rapidly changing society.
3. To provide an opportunity for students to elect and pursue individual interests and specialization in the study of the business environment.
4. To develop acceptable communication and interpersonal skills.
5. To develop the thinking strategies and problem-solving abilities of students.
6. To provide an opportunity for students to relate and apply learnings in business education to other areas of study.
7. To expose students to the vast laboratory of business for the purpose of acquiring information, gaining experience and testing ideas and hypotheses.
8. To provide for a general understanding of business and the development of skills for personal use.
9. To provide background skills and knowledge for specialization in business and/or admission to post-secondary programs.
10. To prepare for job entry upon completion of high school and for future advancement in business.

SCHEMATIC OVERVIEW OF BUSINESS EDUCATION HIGH SCHOOL PROGRAM



GUIDELINES FOR STRUCTURING BUSINESS EDUCATION COURSE

GENERAL GUIDELINES

The structure of the business education program allows schools to design courses to meet the specific needs of the students in that school. The content has been organized into sequenced and unsequenced modules organized under the following eight main subject areas, or strands.

- | | |
|---------------------------------------|--------------------------------|
| 1. Accounting 10, 20, and 30 | 5. Marketing 20 and 30 |
| 2. Basic Business 20 and 30 | 6. Office Procedures 20 and 30 |
| 3. Computer Processing 10, 20, and 30 | 7. Typewriting 10, 20, and 30 |
| 4. Law 20 and 30 | 8. Shorthand 20 and 30 |

Subject to the constraints outlined in the curriculum guides, modules are to be formatted into 3- or 5-credit courses within each strand. Schools or school jurisdictions should designate 3 modules for a 3-credit course and 5 modules for a 5-credit course. The optional strand modules may be used to enhance the subject area strands or, alternatively, combined to form 3-credit courses.

The program to be offered should be established through consultation of teaching, guidance, and administrative personnel. In order to promote consistency between grade levels and establish appropriate standards for student evaluation, jurisdictions may wish to monitor the selection of modules. Care should be taken to ensure that students' programs do not repeat certain modules.

Course sequences are outlined in the yearly-published Junior-Senior High School Handbook. These course sequences are also listed on page 8. For further information regarding module sequences and equipment requirements, refer to the specific modules within the curriculum guides and/or the Business Education Manual for Administrators, Counsellors, and Teachers.

BUSINESS EDUCATION 10, 20, AND 30

In addition to or as an alternative to the courses designated under the subject strands, (i.e. Typewriting 20, Law 30, etc.) 3, 5, or 10 credits may be offered in each of Business Education 10, 20, and 30 to a maximum of 30 credits. Business Education 10, 20, or 30 courses are created by selecting a number of modules from the eight main subject strands as well as from the Optional strand. Elective modules within the subject strands may only be selected if students have taken the core modules identified in the strands. Business Education 10, 20, and 30 courses are sequential.

MINICOURSES

As an alternative to using the modules in the Optional strand to enhance subject area courses, modules from the Optional strand may be grouped together to form 3-credit courses as follows:

- | | | |
|---------------------------|---|---|
| Record Keeping 10 | - | (1) Record Keeping 1
(2) Record Keeping 2
(3) Record Keeping 3 |
| Business Calculation 20 | - | (4) Business Calculation 1
(5) Business Calculation 2
(6) Business Calculation 3 |
| Business Communication 20 | - | (7) Business Communication - Development
(8) Business Communication - Practice
(9) Business Communication - Integration |
| Dicta Typing 20 | - | (12) Dicta Typing 1
(13) Dicta Typing 2
(16) Business Simulation |
| Word Processing 30 | - | (14) Word Processing 1
(15) Word Processing 2
(16) Business Simulation |

ENHANCEMENT: Use of Optional Modules

A subject strand course may be enhanced by including a module or modules from the Optional strand that supports the objective for a particular course. Inclusion of modules from subject strands other than Optional is not permissible. Not more than one Optional module may be included at each grade level in a 3-credit course, and not more than two optional modules may be included at each grade level in a 5-credit course. The Business Research and Business Simulation modules may, however, be used once in each subject strand provided that the topic is not duplicated. The Optional strand modules are:

1. Record Keeping 1
2. Record Keeping 2
3. Record Keeping 3
4. Business Calculation 1
5. Business Calculation 2
6. Business Calculation 3
7. Business Communication - Development
8. Business Communication - Practice
9. Business Communication - Integration
10. Business Research Project
11. Goal Setting and Career Development
12. Dicta Typing 1
13. Dicta Typing 2
14. Word Processing 1
15. Word Processing 2
16. Business Simulation

BUSINESS EDUCATION PROGRAM

Course Sequences

Courses listed on the same line and to the left indicate a prerequisite. The maximum credits available to a student for use on a high school diploma is shown in the left column. Whether the course may be offered for 3 and/or 5 credits is shown in brackets following the course name. Some courses have additional prerequisites. These are indicated with solid lines.¹

Maximum
Credits

<u>13</u>	1501 Accounting 10 (3)(5)	2501 Accounting 20 (3)(5)	3500 Accounting 30 (5)
<u>15</u> ³	1527 Computer Processing 10 (3)(5)	2527 Computer Processing 20 ² (3)(5)	3527 Computer Processing 30 (3)(5)
<u>10</u>		2541 Basic Business 20 (3)(5)	3541 Basic Business 30 (3)(5)
<u>30</u>	1542 Business Education 10 (3)(5)(10)	2542 Business Education 20 (3)(5)(10)	3542 Business Education 30 (3)(5)(10)
<u>3</u>	1550 Record Keeping 10 (3)		
<u>3</u>		2566 Dicta Typing 20 (3)	
<u>15</u>	*1565 Typewriting 10 (3)(5)	2565 Typewriting 20 (3)(5)	3565 Typewriting 30 (5)
<u>3</u>			3567 Word Processing 30 (3)
<u>10</u>		2555 Shorthand 20 (3)(5)	3555 Shorthand 30 (3)(5)
<u>10</u>		2545 Office Procedures 20 (3)(5)	3545 Office Procedures 30 (3)(5)
<u>3</u>		2543 Business Communication 20 (3)	
<u>3</u>		2544 Business Calculation 20 (3)	
<u>10</u>		2430 Law 20 (3)(5)	3430 Law 30 (3)(5)
<u>10</u>		2540 Marketing 20 (3)(5)	3540 Marketing 30 (3)(5)

¹ Please refer to the BUSINESS EDUCATION MANUAL FOR ADMINISTRATORS, COUNSELLORS, AND TEACHERS for criteria for module selection.

* Typewriting 10 is required for Dicta Typing 20; Typewriting 20 is required for Word Processing 30, Shorthand 30, and Office Procedures 30.

² Computer Literacy 10 may be used as an alternate prerequisite to Computer Processing 20.

³ A student can take Computer Literacy 10 or Computer Processing 10, followed by Computer Processing 20 and then Computer Processing 30. However, the maximum number of credits available to a student in Computer Literacy and Computer Processing is fifteen (15).

BUSINESS EDUCATION MATRIX

(13)* ACCOUNTING	(10)* BASIC BUSINESS	(15)* COMPUTER PROCESSING	(10)* LAW
C 1. Basic Accounting Concepts C 2. Journalizing and Posting C 3. Completing the Accounting Cycle C 4. Merchandise Accounting C 5. End-of-Year Adjustments & 8-Column Worksheets E 6. Optional Accounting Tasks E 7. Voucher System and End-of-Year Adjustments E 8. Departmentalized Accounting E 9. Partnership and Corporation Accounting E 10. Cost Accounting E 11. Financial Analysis E 12. Accounting Simulation I E 13. Accounting Simulation II: Computerized Accounting	C 1. Canadian Business C 2. Consumer Credit C 3. Insurance C 4. Economic Concepts C 5. Small Business Management I C 6. Management Techniques E 7. Personal Financial Planning E 8. Small Business Management II (Simulation)	C 1. Computers in Business E 2. Overview of Software E 3. Applications: Data Entry E 4. Applications: Word Processing E 5. Applications: Business Simulations E 6. Applications: Data Base E 7. Applications: Electronic Spread Sheet E 8. Overview of Introductory Programming Language E 9. Fundamentals of Input/Output E 10. Introduction to Advanced Computer Programming Techniques E 11. Advanced Computer Programming Techniques E 12. Extended Programming Project E 13. Introduction to Business Programming Language E 14. Applications in Business Programming Language E 15. Extended Project in Business Programming Language E 16. Graphics E 17. Business Systems Analysis and Program Development E 18. Machine/Assembly Language	C 1. Nature of Law and the Civil Law System C 2. Contract Law C 3. Family Law C 4. Basic Rights and Responsibilities C 5. Labour Law C 6. Property Law E 7. Criminal Justice System E 8. Consumer Law E 9. Tort Law E 10. Controversial Issues

(10)* MARKETING	(10)* OFFICE PROCEDURES	(10)* SHORTHAND	(15)* TYPEWRITING
C 1. World of Marketing C 2. Advertising and Sales Promotion C 3. Distribution of Goods and Services C 4. Marketing Research C 5. Pricing and Financial Activities C 6. Salesmanship E 7. Display E 8. Purchasing & Controlling Merchandise	C 1. Structure of the Business Office E 2. Personnel in the Business Office E 3. Business Communication E 4. Records Management E 5. Information Processing E 6. Clerical Routines E 7. Secretarial Routines E 8. Office Specialties I E 9. Office Specialties II E 10. Office Simulation	C 1. Shorthand Theory 1 C 2. Shorthand Theory 2 C 3. Shorthand Theory 3 E 4. Shorthand Theory, Dictation & Transcription 1 E 5. Shorthand Theory, Dictation & Transcription 2 E 6. Speed & Transcription Skill Building 1 E 7. Speed & Transcription Skill Building 2 E 8. Speed & Transcription Skill Building 3 E 9. Speed & Transcription Skill Building 4 E 10. Speed & Transcription Skill Building 5	C 1. Keyboarding C 2. Keyboarding, Centring and Tabulation C 3. Letters and Essays C 4. Reports C 5. Letters & Tables C 6. Manuscripts C 7. Tables, Business Forms & Financial Reports C 8. Business Correspondence E 9. Specialized Prod. Applications E 10. Production Projects & Review E 11. Professional Applications I E 12. Professional Applications II E 13. Simulation I E 14. Simulation II

OPTIONAL	1. Record Keeping 1	5. Business Calculation 2	9. Business Communication - Integration	13. Dicta Typing 2
Subject to restrictions noted in the curriculum guides, these optional modules may be used to enhance the above courses.	2. Record Keeping 2	6. Business Calculation 3	10. Business Research Project	14. Word Processing 1
	3. Record Keeping 3	7. Business Communication - Development	11. Goal Setting and Career Development	15. Word Processing 2
	4. Business Calculation 1	8. Business Communication - Practice	12. Dicta Typing 1	16. Business Simulation

(3)* RECORD KEEPING 10	(3)* BUSINESS CALCULATION 20	(3)* BUSINESS COMMUNICATION 20	(3)* DICTA TYPING 20	(3)* WORD PROCESSING 30
C 1. Record Keeping 1 C 2. Record Keeping 2 C 3. Record Keeping 3	C 1. Business Calculation 1 C 2. Business Calculation 2 C 3. Business Calculation 3	C 1. Business Communication - Development C 2. Business Communication - Practice C 3. Business Communication - Integration	C 1. Dicta Typing 1 C 2. Dicta Typing 2 C 3. Business Simulation	C 1. Word Processing 1 C 2. Word Processing 2 C 3. Business Simulation

(30) BUSINESS EDUCATION 10-20-30
Modules from any of the 8 subject strands, and/or the Optional strand may be combined to form three, five or ten credit courses at the 10, 20 or 30 level. The courses are sequential. Elective modules may only be included in a program when core modules have been completed. Care should be taken to ensure that student programs do not duplicate modules.

*Refers to maximum credits available.

Code: C - Core
E - Elective

Note: Core modules are prerequisite to elective modules.

ALBERTA EDUCATION PUBLICATIONS

The following service publications and prescriptive documents are available to administrators and business education teachers from Alberta Education.

From Curriculum Branch, Program Development Division

1. Program of Studies
2. Junior-Senior High School Handbook
3. Accounting 10-20-30 Curriculum Guide
4. Basic Business 20-30 Curriculum Guide
5. Computer Processing 10-20-30 Curriculum Guide
6. Law 20-30 Curriculum Guide
7. Marketing 20-30 Curriculum Guide
8. Office Procedures 20-30 Curriculum Guide
9. Shorthand 20-30 Curriculum Guide
10. Typewriting 10-20-30 Curriculum Guide
11. Optional (Business Education 10-20-30) Curriculum Guide
 - 11.1 Record Keeping 10
 - 11.2 Business Calculation 20
 - 11.3 Business Communication 20
 - 11.4 Dicta Typing 20
 - 11.5 Word Processing 30
12. Junior High School Typewriting Curriculum Guide, 1973

From School Book Branch

1. School Book Branch Catalogue
2. Implementing Computer Literacy Programs in Schools (Section 3)

For further information, contact Curriculum Branch, (Program Development Division), Edmonton or Calgary Regional Offices, (Program Delivery Division).

OFFICE PRODECURES 20

OFFICE PROCEDURES 30

Introduction to Office Procedures

Office Procedures provides students with the opportunity to study the structure, procedures and technology common to modern Canadian business offices.

A major focus of the course is on the integration of skills, procedures, and attitudes within an environment that simulates a modern office.

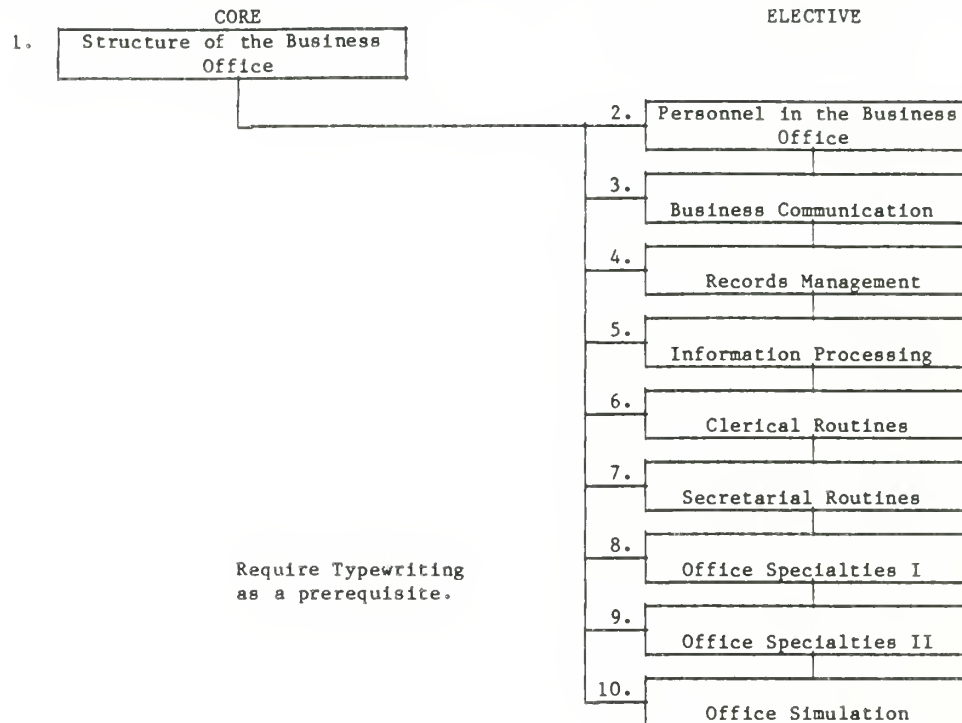
The Office Procedures program encourages the development of vocational-level competencies suitable for students interested in business careers. In addition, it can provide more specialized training in the area of clerical or secretarial occupations.

Objectives

The student will:

1. Examine the organization, functions, and procedures common to a business office.
2. Examine the various career paths, benefits, and responsibilities of the personnel within the business office.
3. Become familiar with the various methods of communication utilized in a modern business office.
4. Apply the current procedures for the storage, retention, reproduction, and retrieval of recorded information.
5. Examine the routines related to the processing of words and data through the study of procedures, equipment, and personnel.
6. Demonstrate the clerical routines that support the efficient handling of goods and services in the modern office.
7. Demonstrate efficient secretarial skills and procedures that support the activities of management.
8. Utilize the terminology, documentation, and procedures prevalent in a selected secretarial specialization.
9. Integrate the basic skills, specialized knowledge, and human relations skills developed throughout the business program, within a simulated or actual business environment.

FLOWCHART OF MODULES WITHIN OFFICE PROCEDURES SUBJECT STRAND



Notes on Course Implementation

The Office Procedures subject strand identifies 10 modules, 1 core and 9 elective. The core module is prerequisite to the elective modules. The elective modules are not sequential, although modules 8 and 9 are recommended for 30 level courses.

Modules 1-5 are particularly suitable for a program designed for students interested in office occupations which do not include secretarial routines. Module 10 could be included to support either clerical or secretarial programs.

Modules 7, 8, 9, 10 require Typewriting as a prerequisite and should be taught in a classroom equipped with electric/electronic typewriters, or machines with text editing capability. Courses offered at the 30 level should expand on the basic concepts and require students to demonstrate a skill level that reflects business-world standards.

Courses may be developed for Office Procedures 20 and 30 in modular groups of 3 or 5 to a maximum of 10 credits. Modules from the "Optional" column which are recommended for use within the course configuration are:

- | | | |
|------------|-----|--------------------------------------|
| Module No. | 8. | Business Communication - Practice |
| | 9. | Business Communication - Integration |
| | 11. | Goal Setting and Career Development |
| | 12. | Dicta Typing 1 |
| | 13. | Dicta Typing 2 |
| | 14. | Word Processing 1 |
| | 15. | Word Processing 2 |
| | 16. | Business Simulation |

Refer to individual modules for further information regarding equipment requirements or prerequisites.

Integration of work study and work experience (cooperative education) programs is encouraged.

MODULE 1: THE STRUCTURE OF THE BUSINESS OFFICE

Status: Core
Prerequisite: None

Purpose: To provide the student with an overview of the office organization and related functions and procedures common to a business office.

Notes: Teachers may wish to spend additional time on some of the procedures that support the basic office functions if Modules 4 or 5 will not be included in the student's program.

TOPIC	LEARNING TASKS	TEACHING NOTES
Organization and Management of a Business	<p>The student will:</p> <p>understand the legal basis for creating various types of businesses</p> <p>describe the types of business organizations</p>	
Role of the Office	<p>explain the role of the office in a business enterprise</p> <p>understand the value of organizational charts and demonstrate an ability to interpret them</p>	<p>Review the organizational charts of a variety of companies (service, manufacturing) and identify the role of the office</p> <p>Prepare a study of an office which includes organizational charts and responsibilities of personnel</p>
Organization of Work Space	<p>examine the physical facility and layout of a typical office</p> <p>demonstrate effective use of work space</p> <p>design a office diagram showing flow of work</p> <p>understand how layout of equipment facilitates the function of the office</p>	<p>Visit several offices to prepare the layout of the facilities, furniture, and equipment; show the normal flow of work and recommend improvements</p>
Legislation Pertaining to the Business Office	<p>examine the safeguards and restrictions provided by legislation and policy guidelines</p> <ul style="list-style-type: none"> - Individual Rights Protection Act - Anti-Discrimination Act - Unemployment Insurance Regulations - Workers' Compensation Regulations 	<p>Copies of legislation: Queen's Printer Manpower Center Workers' Compensation Board</p>

MODULE 2: PERSONNEL IN THE BUSINESS OFFICE

Status: Elective
Prerequisite: Module 1

Purpose: To expand the student's awareness of the various career paths, benefits, and responsibilities of personnel within the business office.

TOPIC	LEARNING TASKS	TEACHING NOTES
Lines of Authority	The student will: compare management and support staff roles and recognize the formal lines of authority (line and staff) within the office	
Job Descriptions	examine comprehensive job descriptions for support staff examine staff recruitment, training, retraining, inservice, and professional development activities differentiate between job descriptions as they are affected by tasks performed and levels of remuneration and benefits explain the working relationships between word originators, administrative secretaries, and correspondence secretaries	Materials available from Canada Manpower Review employment statistics (Statistics Canada)
Human Relations	examine positive human relations and interpersonal relations as they affect teamwork, morale, and productivity recognize the need to develop a positive personal philosophy to lead to future success in business recognize the importance of efficient and effective personal communications skills when working in a business environment	Develop a checklist comparing expectations in business relationships and social relationships
Attitudes	develop an awareness of the importance of effective personal grooming and wardrobe selection demonstrate conduct suitable to the business office identify the formal and informal recourses available to the individual when difficult situations arise (i.e. harassment, discrimination)	Prepare a portfolio showing a wardrobe suitable for work External - Human Rights Commission Internal - administrative or personnel departments

TOPIC	LEARNING TASKS	TEACHING NOTES
Attitudes (cont'd)	<p>explain the effects that absenteeism, job ineffectiveness, tardiness, and poor human relations have on a successful business enterprise</p> <p>demonstrate the positive work attitudes, habits, and good human relations skills that promote success in the business enterprise</p>	
Ethics in the Business Office	<p>understand and adhere in an appropriate manner to:</p> <ul style="list-style-type: none"> - office rules and regulations - personal ethics - business ethics - confidentiality - bonding <p>understand concepts of master/servant and principal/agent</p>	Review office (or school) handbooks
Career Preparation Activities	<p>perform various activities in both a simulated and real environment</p> <p>improve writing and verbal communication skills</p> <p>explore careers, job descriptions, and expectations</p> <p>prepare a portfolio containing resume, transcripts, awards, etc.</p>	

MODULE 3: BUSINESS COMMUNICATION

Status: Elective
Prerequisite: Module 1
Typewriting, Module 3 (recommended)

Purpose: To provide the student with an opportunity to become familiar with the various methods of communication utilized in a modern business office.

TOPIC	LEARNING TASKS	TEACHING NOTES
Non-Written Forms of Communication	<p>The student will:</p> <p>demonstrate effective oral communication using appropriate body language</p> <p>be aware of the significance of body language</p> <p>demonstrate and develop the art of listening</p>	
Meeting the Public	<p>demonstrate appropriate ways to receive and interview callers, to obtain information about callers, and to announce callers</p> <p>practise making proper introductions</p> <p>understand and practise courtesies common to the business world</p>	Demonstrate appropriate responses with role playing
Telecommunication Services	<p>develop awareness of the wide range of methods of communication available to the business world</p> <p>describe special communication services such as Telidon and video telephones</p> <p>practise the use of telephone courtesy and speech</p> <p>explain the routine to be followed for incoming and outgoing calls</p> <p>explain the use of special telephone equipment and communication services</p> <p>be able to prepare the forms that support the various telecommunication services</p>	<p>Identify and compare the equipment and procedures involved in communication in a small and large firm</p> <p>Obtain teletrainer (Alberta Government Telephones, City Telephones)</p>
Written Forms of Communication	<p>compose effective letters, memos, and telecommunications with emphasis on correct grammatical structure and clarity of expression</p>	

TOPIC	LEARNING TASKS	TEACHING NOTES
Written Forms of Communication (cont'd)	<p>demonstrate consistency in the preparation of various letter styles, envelopes, and business forms</p> <p>write situational types of letters and notes (e.g., inquiry, invitation, appointment, and sympathy)</p>	
Reproduction of Written Information	<p>identify equipment that will reproduce hard copy such as; electronic, infrared, and phototypeset machines</p> <p>understand when and where stencil, mimeograph, spirit, and offset duplicating equipment is used</p> <p>demonstrate skill in layout of material to produce camera-ready copy</p>	Prepare a display of equipment
Transmission of Written Communications	<p>understand the various classes of mail and demonstrate an ability to complete necessary form</p> <p>calculate the charges for the different postal classes</p> <p>describe the characteristics of postal services such as registered and certified mail, special delivery, and money orders</p> <p>distinguish between and demonstrate the mailing procedures used in small and large offices</p> <p>describe and assess other means of mail delivery such as courier</p> <p>recognize the impact of electronic technology and communicating terminals on transmission of written communication</p>	Materials available from Canada Post
Business Meetings	<p>demonstrate ability to arrange business meetings for various types of business enterprises</p> <p>understand and be able to apply parliamentary procedures (Robert's Rules of Order)</p> <p>understand the purpose and importance of formal and informal meetings to business communication</p> <p>develop skills to promote efficient use of time, facilities, and personnel during business meetings</p>	Attend a formal meeting and/or simulate a meeting

MODULE 4: RECORDS MANAGEMENT

Status: Elective
Prerequisite: Module 1

Purpose: To enable the student to understand and apply current procedures for the storage, retention, reproduction, and retrieval of recorded information.

TOPIC	LEARNING TASKS	TEACHING NOTES
Types of Filing	<p>The student will:</p> <p>distinguish between case and subject files</p> <p>identify the wide variety of material to be filed as case or subject</p> <p>understand the advantages and disadvantages of the various types of filing</p>	
Classifying Methods	<p>practise the systems and procedures used in:</p> <ul style="list-style-type: none"> - alphabetic filing system - alpha-numeric filing systems - numeric filing systems 	Prepare a chart showing various filing systems
Filing Equipment	<p>become aware of the various types of filing equipment used in:</p> <ul style="list-style-type: none"> - manual systems - automated systems - digital (keyboard access files) systems - microform systems <p>understand the use of the equipment used to support microform systems such as:</p> <ul style="list-style-type: none"> - tape files - microfiche - microfilm <p>understand the use of the equipment used to support manual systems such as:</p> <ul style="list-style-type: none"> - vertical files - horizontal files - rotary card files - visible card files 	<p>Prepare a display showing the various types of equipment</p> <p>Obtain supplier catalogs</p>

TOPIC	LEARNING TASKS	TEACHING NOTES
Filing Supplies and Forms	<p>prepare and use:</p> <ul style="list-style-type: none"> - file guides - file folders - file labels - miscellaneous supplies - cross-reference sheets - input documents - miscellaneous forms 	
Incoming Filing Procedures	<p>demonstrate the proper procedures used in:</p> <ul style="list-style-type: none"> - document preparation for new files - document preparation for existing files - information routing and maintaining restrictions - indexing and coding - cross referencing - sorting - typing labels 	
Outgoing Filing Procedures	<p>demonstrate the proper technique for:</p> <ul style="list-style-type: none"> - charge out methods - file recall - reducing misfiles - search techniques - retention scheduling - classification of records 	
Establishing Filing Systems	<p>understand the factors essential to an effective filing system</p> <p>develop a classification guide (filing manual)</p> <p>learn to organize a small filing system</p>	<p>Prepare a miniature filing system that meets the records management needs of an office (school, business)</p> <p>Materials from Administrative Records Management Association</p>

MODULE 5: INFORMATION PROCESSING

Status: Elective
Prerequisite: Module 1
Typewriting: Module 5 (recommended)

Purpose: To enable the student to understand the routines related to processing of information through the study of procedures, equipment, and people.

Notes: The emphasis of this module is on developing an awareness of the CONCEPTS related to word and data processing. Word Processing I and II (from the Optional strand) should be used for developing operator skill on word processing equipment.

Equipment: It is recommended that students have an access to dictation equipment and data and/or word processing equipment.

TOPIC	LEARNING TASKS	TEACHING NOTES
Development of Electronic Information Processing	<p>The student will:</p> <p>review the history of processing information</p> <p>recognize that technological advances and increased labor costs have promoted the use of electronic processing of information</p> <p>become aware of the wide variety of information processing equipment available to meet the specific needs of business and industry</p> <p>understand the basic information processing process - input, output, storage, process, and distribution</p>	
Terminology	<p>understand the meaning of and be able to apply terms specific to the procedures and technology of information processing</p>	
Organizational Concepts for Information Processing Centers	<p>compare traditional and modern office organization</p> <p>recognize the basic information processing systems</p> <p>explain the personnel support systems necessary to use the equipment efficiently</p>	Prepare a diagram of information processing centers
Information Processing Equipment	<p>recognize the function of various pieces of information processing equipment</p> <p>understand the relationship of equipment to input, output, storage and distribution of information</p>	

TOPIC	LEARNING TASKS	TEACHING NOTES
Information Processing Equipment (cont'd)	become aware of the needs and problems related to having information processing equipment in the office	
Input Procedures	<p>understand the use of the various input devices</p> <ul style="list-style-type: none"> - portable units - desktop units - central systems - telephone tie-ins <p>demonstrate the proper procedures for inputting information on dictation equipment</p> <p>evaluate recorded dictation for proper dictation techniques including providing all necessary information and use proper editing skills</p> <p>dictate material and instructions to another person on a person-to-person basis and on a machine</p>	
Proofreading and Editing	<p>recognize the importance of accurate proofreading</p> <p>identify and correct common errors within text and format</p> <p>demonstrate efficient proofreading skills using:</p> <ul style="list-style-type: none"> - paperball method - comparison of copy to the original - copyholding - visual screen <p>use accepted proofreading symbols</p> <p>develop facility in accurate and efficient proofreading skills</p>	
Storage of Information	<p>give reasons for establishing a filing system</p> <p>define the terms: logging, log sheet, mark code</p> <p>list steps in logging material</p>	

TOPIC	LEARNING TASKS	TEACHING NOTES
Storage of Information (cont'd)	<p>understand how a mark code at the beginning and end of each document aids in efficient retrieval</p> <p>keep a log of materials transcribed for a designated period</p> <p>explain how a library of recorded material is established</p> <p>explain how to retrieve stored information</p> <p>understand the importance of environmental controls</p> <p>define terms related to file handling information processing equipment</p> <p>develop awareness of the importance of efficient retention procedures</p>	
Reproduction	<p>become aware of the variety of equipment available to the business office to reproduce information</p> <p>decide which method of duplication is most suitable within a variety of situations and circumstances</p>	
Distribution	<p>demonstrate awareness of the wide variety of distribution networks available for transmitting information internal to the office and external to the office</p>	

MODULE 6: CLERICAL ROUTINES

Status: Elective
Prerequisite: Module 1

Purpose: To provide students with the opportunity to understand and develop skill in the clerical routines that support the handling of goods and services in the modern office.

TOPIC	LEARNING TASKS	TEACHING NOTES
Business Systems	The student will: understand the various forms of business systems	filing, reprographic, word processing, data processing, mailing, shipping, manufacturing, customer service, and accounting systems
Purchasing Routines	recognize the procedures for purchasing goods within large and small offices demonstrate proper techniques to handle forms recognize sources for purchasing goods and services complete purchase requisitions and recognize the importance of following buyer's instructions analyze and prepare purchase orders prepare and audit purchasing forms such as purchase requisitions, purchase orders analyze and check invoices compute purchase discounts	
Stockroom Control	understand the purpose of the information on stockroom records recognize the importance of control procedures prepare and audit stockroom control forms such as stock requisitions, bills of lading understand the importance of efficient inventory procedures	
Sales Routines	understand the basic receiving, shipping, and billing procedures examine and demonstrate understanding of methods of selling such as telephone, person-to-person, and catalogue	

TOPIC	LEARNING TASKS	TEACHING NOTES
Sales Routines (cont'd)	<p>prepare, audit, and analyze sales orders, sales invoices, terms of sale, credit invoices, taxes, and discounts</p> <p>determine selling price, margin, mark-up</p>	
Banking Routines	<p>understand the various types of bank accounts</p> <p>understand the procedures for accepting and depositing cash</p> <p>demonstrate the correct procedure to reconcile bank accounts and bank statements</p>	
Accounting Routines	<p>understand the importance of financial documents such as Balance Sheet, Income Statement ...</p> <p>understand the relationship of budgeting controls and expenditures</p>	
Transportation of Goods	<p>recognize alternate transportation methods (land, air, and sea) and compare advantages and disadvantages of the methods</p> <p>understand the purpose of bills of lading and commercial drafts</p> <p>define charge prepaid and COD service and understand how to arrange for such services</p> <p>recognize the importance of insuring goods</p>	

MODULE 7: SECRETARIAL ROUTINES

Status: Elective
 Prerequisite: Office Procedures - Module 1
 Corequisite: Typewriting - Module 8

Purpose: To provide students with the opportunity to understand and develop skill in the secretarial routines that support the activities of management.

Notes: It is recommended that students have access to text-editing equipment.

TOPIC	LEARNING TASKS	TEACHING NOTES
Sources of Information	<p>The student will:</p> <p>examine and efficiently utilize various business references</p> <p>be able to locate out-of-office sources of information such as specialized business references and dictionaries</p> <p>locate sources of information and do research pertinent to assigned topics</p>	
Input/Output of Information	<p>demonstrate effective keyboarding skill as it applies to data and word processing equipment</p> <p>produce mailable copy, under a variety of conditions, and from various types of input such as:</p> <ul style="list-style-type: none"> - straight copy material - unedited material - edited material - dictated information (person-to-person or taped) 	
a. Formatting and Organizing Material	<p>prepare from unarranged data a variety of business reports utilizing displays, headings, enumerations, tabulations, graphs, charts, and financial statements</p> <p>develop skill in efficient performance of tasks involving simple and complex instructions</p>	
b. Editing Skills	<p>develop proper and efficient editing skills</p> <p>refer to appropriate references when making editing decisions</p>	
c. Listening Skills	<p>demonstrate effective listening skills to facilitate proper response to instructions</p>	

TOPIC	LEARNING TASKS	TEACHING NOTES
Measurement of Production	<p>recognize how maintaining efficient production standards affects an operator's salary and opportunities for promotion</p> <p>list circumstances that can affect the length of time needed to produce work</p> <p>recognize the variety of ways production can be measured</p> <p>use various production measurements as an instrument for increasing output</p> <p>recognize the effect errors have on production rate</p> <p>compute personal production rate of various types of production assignments</p>	
Handling Executive Travel	<p>plan a business trip, prepare an itinerary, and finalize arrangements for business travel</p> <p>perform the secretarial and administrative duties which may be required during absence of executive</p>	
Business Meetings	<p>prepare accurate minutes on the proceedings of meetings, seminars, or workshops</p> <p>make arrangements for meetings including booking facilities, making reservations, and obtaining needed supplies</p> <p>develop awareness of secretarial duties related to the monitoring of future action within the business meeting</p>	
Secretarial Financial Management	<p>understand the purpose of various types of bank accounts</p> <p>understand the procedures for accepting and depositing cash</p> <p>demonstrate the correct procedure to reconcile a business executive's bank statement</p> <p>establish and maintain a petty cash fund</p>	

MODULE 8: OFFICE SPECIALTIES I

Status: Elective
Corequisite: Typewriting - Module 8

Purpose: To acquaint the student with tasks and attitudes consistent with the terminology, documentation, and procedures prevalent in a selected secretarial specialization and to encourage the integration of skills.

Notes: Access to teacher-prepared or publisher-produced materials that allow students to use actual business forms and complete real or simulated office tasks within a limited time. The standards should integrate the concepts of mailability and economy of time with respect to labour, equipment, and supplies. It is recommended that students have access to text-editing equipment. It is also recommended that this module be offered at the 30 level.

TOPIC	LEARNING TASKS	TEACHING NOTES
Specialized Terminology	The student will: select and become familiar with terminology unique to the chosen specialty	
Specialized Resources	select suitable texts, reference books, and tapes, and demonstrate effective use of suitable sources of information	
Application of Basic Skills	apply previously-learned secretarial skills to the tasks required in the chosen specialty project	
Development of Specialized Skills	prepare documents relative to a chosen specialty in an efficient and competent manner	
Assessment and Evaluation	demonstrate efficient methods of production under time constraints	
Management of Time, Resources, and Personnel	demonstrate the ability to establish suitable priorities and completion dates for assignments	
Scope of Knowledge and Skill within Specialization	demonstrate knowledge of the scope and sequence of duties relative to the particular area of chosen specialty	
Career Opportunities	perform various tasks and cope with problems which may arise in simulated activity prepare an evaluation of the factors that influenced the quality and quantity of output and as to how the activity could have been improved	

MODULE 9: OFFICE SPECIALTIES II

Status: Elective
Prerequisite: Office Procedures: Module 7
Typewriting: Module 8

Purpose: To provide an opportunity for the student to pursue further study in an area of secretarial specialization, within an office-like environment that requires interaction with others in a variety of roles.

Notes: Access to a model office would provide valuable experience. Students should be required to interact with others as they complete their assignments; providing experience in accepting responsibility, working with others in both collegial and authoritarian circumstances, and managing time, equipment and supplies efficiently. It is recommended that students have access to text-editing equipment. It is also recommended that this module be offered at the 30 level.

TOPIC	LEARNING TASKS	TEACHING NOTES
Decision Making and Setting Objectives	The student will: identify a particular area of study	
Planning and Setting Priorities	formulate a plan of action for the particular area of study that establishes personal goals, learning objectives, time line, and output standards devise a method of evaluating the achievement of goals, content learned, and output of material	
Integration of Skills	apply previously acquired skills when performing tasks required by the plan of action demonstrate a high degree of self-motivation submit progress reports at specified intervals	
Defining Lines of Authority	recognize and respond appropriately to established lines of authority demonstrate appropriate methods of disputing decisions made by those in authority	
Defining Areas of Responsibilities	recognize the importance of accepting responsibility develop skills in dealing with responsibilities	

MODULE 10: OFFICE SIMULATION

Status: Elective
Prerequisite: Module 1

Purpose: To provide students with job preparation activities in a simulated and real environment.

Notes: Serious consideration should be given to integrating the work study program with this module.

TOPIC	LEARNING TASKS	TEACHING NOTES
Defining Responsibilities	<p>The student will:</p> <p>recognize the difference between responsibilities designated and responsibilities accepted</p> <p>examine various job descriptions</p>	
Future Career Paths	<p>prepare an in-depth report of a specific job, as described in CCDO, with particular emphasis on the local situation</p>	
Lines of Authority	<p>relate the defined responsibilities to the recognized authority structure</p> <p>understand the limits of decision-making within the position</p>	
Tasks and Procedures	<p>maintain a log of activities performed</p> <p>attach priorities to activities, recognizing the difference between essential and optional tasks</p> <p>develop a procedures manual that provides clarification of efficient, accepted methods of meeting the identified responsibilities</p>	
Human Relations Relations	<p>evaluate interpersonal skills, attitude, motivation, initiative, cooperation, and confidence</p>	

LEARNING RESOURCES

The prescribed learning resources are:

Luke, C.M. and Stiegler, C.B. Office Systems and Procedures, Canadian Edition, Houghton Mifflin Canada Ltd. (suitable for introductory level for either secretarial or clerical emphasis).

Note: Additional resources will be approved for modules 8, 9, and 10.

* The recommended learning resources are:

Teacher's manual to Office Systems and Procedures.

Student Activities (Workbook) to Office Systems and Procedures.

CORRELATION OF COURSE CONTENT WITH LEARNING RESOURCES

Office Procedures Subject Strand		
<u>Module</u>		
1	Chapter 1, Part 1	Chapter 3, Parts 1, 2
2	Chapter 1, Parts 2, 3 Chapter 2, Part 3	Chapter 17, Parts 1, 2, 3, 4
3	Chapter 2, Parts 1, 2 Chapter 4, Parts 1, 3	Chapter 5, 6, 10
4	Chapter 8, 9	
5	Chapters 10, 11, 12	
6	Chapters 14, 15	Chapters 16, Parts 1, 2
7	Chapters 2, 11 (Review)	Chapter 4, Part 3
8, 9, 10		

*Additional recommended and supplementary resources may be approved in 1984-85 school term.

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